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## Malaysia: Poultry Products

Outbreaks of highly pathogenic avian influenza in early to mid 2004 constrained demand for chicken meat into domestic and export markets at a time of increased production. During the outbreaks, the industry claimed that chicken demand was down 50 percent. In 2004 broiler meat exports fell to 2,554 MT compared to 5,195 MT in 2003.

Singapore imposed a temporary suspension on all Malaysian poultry after H5N1 was discovered in Kelantan in August 2004. Singapore allowed limited resumption in September 2004 from Malacca and Johore. In April 2005 poultry from Selangor and Negeri Sembilan were allowed entry. Japan still hasn't lifted the suspension of imports. Singapore is Malaysia's largest export market for live poultry and poultry products.

Broiler production has recovered in 2005 and is projected to reach 480 million MT compared to about 454 million birds in 2004. Lower feed prices and freight charges combined with the de-pegging of the Malaysian ringgit (to the U.S. dollar) in July lowered the cost of production. However, the cost of production is likely to increase due to increased delivered prices of day old chicks and feed delivery costs due to higher gasoline prices. In 2006, growth is likely to slow in line with a slower pace of economic growth and rising production costs.

Annual per capita consumption of chicken is 35 kg, one of the highest in the world. Chicken does not have dietary prohibitions or religious restrictions – such as pork and beef for the minority Hindus and pork for the majority Muslims. Most Muslims consumers insist on Halal and foodservice only purchases Halal.

### Malaysian Broiler Meat Imports in Metric Tons

	Jan-Dec 2004	Jan-Apr 2005
U.S	417	735
Denmark	6,838	967
Netherlands	5,848	3,680
France	2,181	875
Germany	205	216
Japan	176	35
Others	147	0
Total	15,812	6,508

Malaysia periodically imports some parts, mostly from Denmark and the Netherlands. Imports from China and Thailand are banned due to avian influenza in those countries. The U.S. has 10 poultry facilities approved by Malaysian authorities.

All turkey meat is imported, mostly from the US. Imports were suspended for six months in 2004 due to a case of high path avian influenza in Texas. The U.S. only has one turkey abattoir approved by the Malaysian authorities.

Source: USDA/ Foreign Agricultural Service

## Japan: Poultry Products

On August 1, 2005 Japan and Thailand reached a basic agreement on a Free Trade Agreement (FTA) that will give Thailand some tariff cuts for poultry. Actual implementation could start as soon as April 2006, which is the beginning of Japan's next fiscal year, and be phased in over a period of five years.

Total imports in 2005 are projected to reach 695,000 MT (395,000 broiler meat and 300,000 prepared products). Imports for Jan-Jun 2005 jumped 53 percent to 350,892 MT compared to the same period last year (201,429 broiler meat, 149,463 prepared products). Brazil is the single largest supplier of frozen raw meat (mostly boneless leg meat) with an 89 percent share. China and Thailand specialize in value added cooked product from designated processing plants until the ban on raw broiler meat is lifted. China has a 52 percent share of prepared products and Thailand has a 46 percent share. Bans on raw broiler meat from China and Thailand will probably be extended into 2006 if sporadic outbreaks continue in both countries.

### Japanese Imports of Broiler Meat, in '000 metric tons

	2002 Jan-Dec	2003 Jan-Dec	2004 Jan-Dec	2004 Jan-Jun	2005 Jan-Jun
Brazil	168.0	174.9	296.1	131.5	179.3
US	49.6	47.2	29.6	5.1	15.5
Thailand	183.3	175.2	12.2	12.2	0.0
China	119.0	62.9	8.4	8.0	0.7
Chile	0.0	0.1	3.9	0.6	2.9
Philippines	0.1	0.0	1.0	0.1	1.5
Malaysia	0.4	0.6	0.7	0.0	0.0
Denmark	0.5	0.2	0.5	0.2	0.2
Poland	0.0	0.0	0.3	0.0	0.7
Others	3.4	4.9	1.2	1.0	0.6
World	524.4	466.1	353.8	158.7	201.4

Domestic broiler meat production is estimated to grow from 1,124,000 MT in 2004 to 1,130,000 MT in 2005 helped by high market prices in the first half of 2005. The 2006 broiler meat production is projected to decline slightly to 1,125,000 MT in 2006.

### Prices of Broiler Legs by Fiscal Year (April-March)

FY	Import (CIF)		Wholesale	Retail
	Yen/kg Fresh	Yen/kg Frozen	Yen/kg Tokyo	Yen/100g Tokyo
2002	208	135	657	125
2003	202	139	565	124
2004	149	158	587	122
2005*	183	140	570	123

\*April-June for imports, April-July for wholesale and retail.

Source: USDA/ Foreign Agricultural Service, ALIC

**Inspected Egg Products-U.S. & Canada Export/Import Trade****U.S./Canadian Live Poultry Slaughtered Under Inspection**

W/E 3-Sep-05 (PRELIMINARY)

**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending September 03, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	255	652	11,748	10,899
Frozen	0	0	113	11
Dried	0	0	489	433
Total	255	652	12,350	11,343

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

Week Ending September 03, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	62	247	4,759	6,514
Frozen	3	0	657	1,280
Dried	0	0	371	1,813
Total	65	247	5,787	9,607

**Inspected Shell Eggs****U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending September 03, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	0	145	318
Extra Large	3,420	7,150	150,345	123,496
Large	5,990	14,630	238,382	266,109
Medium	990	7,098	74,899	89,599
Ungraded	3,660	12,006	75,364	206,868
Misc	0	0	8,053	16,790
Total	14,060	40,884	547,188	703,180

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

**U.S. Fowl Slaughtered Domestically**

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,369	1,338	2,707
Last Week	1,458	1,481	2,939
Same week yr ago	1,464	1,571	3,035
To-date/2005	52,427	49,895	102,322
To-date/2004	47,691	46,694	94,385

**U.S. Fowl Slaughtered in Canada**

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	289	0	289
Last Week	382	3	385
Same week yr ago	167	0	167
To-date/2005	9,215	40	9,255
To-date/2004	8,452	90	8,542

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

**Total U.S. Fowl slaughtered in the U.S. and Canada**

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,658	1,338	2,996
Last Week	1,840	1,484	3,324
Same week yr ago	1,631	1,571	3,202
To-date/2005	61,642	49,935	111,577
To-date/2004	56,143	46,784	102,927

Source: USDA/AMS Poultry Programs, Market News Branch

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Sep 09, 2005

**CHICKEN WITH SKIN ADDED**

--- PRICES ---		---- VOLUME ----		
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	23.00	20,400	-
WTD AVERAGE		23.00		
15-20%				
RANGE	17.00-25.00	18.00-23.00	1,332,000	967,200
WTD AVERAGE	18.61	20.67		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Sep 09, 2005

**CHICKEN WITH SKIN ADDED**

--- PRICES ---		---- VOLUME ----		
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	18.00-21.00	21.00-22.00	740,000	260,000
WTD AVERAGE	20.40	21.42		
15-20%				
RANGE	16.00-22.00	16.00-22.00	1,880,000	1,040,000
WTD AVERAGE	19.13	18.86		
20% OR MORE				
RANGE	-	14.00	40,000	-
WTD AVERAGE		14.00		

\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT**, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 9 SEPTEMBER 2005.

The market tone on tom breast meat, tenderloins and breast trim was steady to firm; scapula steady to fully steady with caution noted; wing meat with skin steady to fully steady on new production, +3 months age steady to barely steady. Demand good on tom breast meat with continued interest noted from Canada and also on destrapped tenderloins and breast trim. Inquiry on the balance of white meat light to moderate. Offerings of frozen scapula mixed, wing meat with skin from new production light at best with older frozen production not as tight, balance short of buyers' needs. The warm weather in some parts of the country is continuing to result in lower than expected live weights. Offerings of hen and tom 2-joint wings short to light with supplies not as tight as previous weeks. Trading continued active on white meat items, balance slow to instances moderate. For domestic: hearts 24, fresh scapula 117-118, Grade A basted 20-24 lb. breasts 155 cents delivered. For export: mature hen drums 39, tom 2-joint wings 44.50 delivered early-mid October, frozen wing meat with skin (-9 months age) 58, fresh thigh meat 90-92, frozen thigh meat (value added) 100 cents delivered.

<b>EXPORT TRADING</b>	<b>PRICE</b>	<b>L.S.T.</b>	<b>WTD AVG</b>	<b>VOLUME</b>	<b>WEEKLY</b>	<b>WEEKLY</b>
<b>FRIDAY, SEPTEMBER 09, 2005</b>	<b>RANGE</b>	<b>CODE 1/</b>	<b>PRICE</b>	<b>(000)</b>	<b>PRICE</b>	<b>(000)</b>
DRUMSTICKS, TOMS	46.00		46.00	40	45.97	378
WINGS FULL-CUT - TOMS	31.00		31.00	104	33.40	260
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		F	26.00	92		
THIGH MEAT - FROZEN	91.00-93.00		91.67	120	91.20	200
<b>EXPORT TRADING</b>	<b>PRICE</b>	<b>L.S.T.</b>	<b>WTD AVG</b>	<b>VOLUME</b>		
<b>THURSDAY, SEPTEMBER 08, 2005</b>	<b>RANGE</b>	<b>CODE 1/</b>	<b>PRICE</b>	<b>(000)</b>		
DRUMSTICKS, TOMS	43.00-44.00		43.67	120		
WINGS FULL-CUT - TOMS		W	35.00	156		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		F	26.00	92		
THIGH MEAT - FROZEN	91.00		91.00	40		
<b>EXPORT TRADING</b>	<b>PRICE</b>	<b>L.S.T.</b>	<b>WTD AVG</b>	<b>VOLUME</b>		
<b>WEDNESDAY, SEPTEMBER 07, 2005</b>	<b>RANGE</b>	<b>CODE 1/</b>	<b>PRICE</b>	<b>(000)</b>		
DRUMSTICKS, TOMS	47.00-48.00		47.50	80		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		R	25.50	40		
MECHANICALLY SEPARATED 2/		M	28.00	40		
THIGH MEAT - FROZEN	91.00-93.00		91.80	100		
<b>EXPORT TRADING</b>	<b>PRICE</b>	<b>L.S.T.</b>	<b>WTD AVG</b>	<b>VOLUME</b>		
<b>TUESDAY, SEPTEMBER 06, 2005</b>	<b>RANGE</b>	<b>CODE 1/</b>	<b>PRICE</b>	<b>(000)</b>		
DRUMSTICKS, TOMS		T	47.22	218		
WINGS FULL-CUT - TOMS	35.00		35.00	156		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		F	26.00	92		
THIGH MEAT - FROZEN		T	90.00	40		

**NO EXPORT TRADING REPORTED ON MONDAY, SEPTEMBER 05, 2005,  
DUE TO LABOR DAY HOLIDAY**

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.